

Checklist for Ending W-2 Paid Placement

*This checklist should be used when a customer is moving from a subsidized to unsubsidized placement **OR** is no longer involved in W-2 services. When making the decision to end W-2 services, follow all internal agency policy and procedure.*

Complete only 1st checkbox if Job Seeker is moving from a subsidized placement (CMC, CSJ, W2T, TJB) to unsubsidized placement (CMS, CMF, CMU)

- ☐ Complete informal assessment driver flow. Run SFED without dates and confirm AGECE. If placement change date is during the 1st – 15th of the month, run SFED with the 1st of that month and confirm AGECE. If placement change is during the 16th – last day of the month, run SFED with the first of the next month and confirm AGECE. CARES may not allow this action during the 16th-19th. If you get the error message “cannot run with passing dates for month not yet issued,” send yourself an alert or mail message to run the case with the 1st of the next month after the 20th of the current month.

Start here for case closures

- ☐ Staff the case with a Case Management Manager prior to beginning closure procedures. Manager initials _____
- ☐ Record reason for ending W-2 services on CMCC.
- ☐ Check that the BST has been completed or declined and appropriate forms in file. (BSTs cannot be updated after case closure. Job seekers who do not show for the BST appointment should be recorded as declined. See policy for cases requiring BST completion.)
- ☐ Record non-participation through yesterday's date on WPNH.
- ☐ Delete any future-dated transportation entries from WPSS.
- ☐ Close all open activities on WPCB with the correct closure code and date. **Educational activities should be reviewed for attainment.**
- ☐ **Review DXNH/DXQW/AFEI, AFLE and AFSE for employment.** If applicable, complete WPEH with employment information prior to case closure.
- ☐ Disenroll case via WPDS.
- ☐ Check AIWC for time clocks with 19 or more months used on a 24 month clock or 55 or more months used on the 60 month clock. If there are 19/55 or more months used on any clock, make sure that AIWE has been completed.
- ☐ Complete ACWI with W-2 end date.
- ☐ Run SFED without dates and confirm AGECE. **If closure date is during the 1st – 15th of the month**, run SFED with the 1st of that month and confirm AGECE. **If closure date is during the 16th – last day of the month**, run SFED with the first of the next month and confirm AGECE. CARES may not allow this action during the 16th-19th. If you get the error message “cannot run with passing dates for month not yet issued,” send yourself an alert or mail message to run the case with the 1st of the next month after the 20th of the current month.
- ☐ Review AQAE to ensure final check is the proper amount.
- ☐ Review childcare authorization. Determine whether or not childcare authorization should continue. E-mail the SSP to request cancellation of childcare authorization, if appropriate.
- ☐ Complete a manual Negative Notice. You must cite the appropriate closure reason code and policy in the body of the notice. Common codes/reasons for closure are: Failure to cooperate with employment search requirements (code 219, policy 2.2.0), failure to complete Employability Plan review (code 558, policy 6.1.1), failure to supply requested verification (code 112, policy 4.1.0), failure to cooperate with child support (code 211, policy 2.2.2.) For other closure reasons, consult your W-2 manual and/or your manager. Retain a copy of the 2-sided Negative Notice in your file and mail the original to your Job Seeker. Make sure you are sending the version that states the 45-day Fact Finding stipulation under the Fact Finding section on the back page.

Additional step if customer has completed a Voluntary Decline of W-2 Services form

- ☐ Complete ACPA. Enter “N” in the W-2 request field, the diversion date (today's date) and diversion reason code. If the individual was in a W2T, CSJ or TJB placement at any time during the W-2 sequence, the only allowable diversion reason to enter is “XW”, not a W-2 diversion. If an individual has not been in a paid W-2 placement during the current episode of W-2, any appropriate reason may be entered.

This checklist must be turned into your manager on the same date of closure or placement change.

Date _____

FEP XMI _____

Job Seeker PIN _____

Job Seeker Name _____